

ARIZONA DEPARTMENT OF EDUCATION

Tom Horne
Superintendent of
Public Instruction



STATE OF ARIZONA

School Finance
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SCHOOL FINANCE MEMORANDUM 10-018

TO: District Personnel Directors, Business Managers, and Superintendents

FROM: Yousef Awwad, Director of School Finance

DATE: September 16, 2009

SUBJECT: FY 2010 SDER – School Data Employee Report

Pursuant to ARS 15-941 Teacher experience index; computation; definition, paragraph C, teacher experience data is required to be transmitted to the Superintendent of Public Instruction on or before October 15, 2009. Please note that this statute has been amended effective FY 2007. Reference the SDER instructions on Page 3,

The Arizona Department of Education has historically captured this data through the School Data Employee Report (SDER) application. This data is required to calculate your district's Teacher Experience Index (TEI) which may increase your FY 2011 budget limit and equalization assistance. All individuals placed on the certified list must have been certified through the State of Arizona Certification Unit. All other employees must be included on the classified list.

All employee data submitted shall include all employees filling a position in the district as of October 1, 2009.

Please note that there are no changes to the instructions for FY 2010. The SDER instructions are included as part of this memorandum. Please note the definition reminders included below.

- **FTE Definition:** FTE represents the percentage of full time status of a teacher. Please see page 6 for additional information.
- **Position FTE:** May be fully reported under "M&O, CSF, IIF, FDK" even if paid out of a Federal Fund. The "Other" field may still be used and the data will be included in the TEI calculation.
- **TEI Calculation:** ALL teachers employed by the district will be included in the TEI calculation.
- **Total Salary:** Report all teacher salary amounts related to the instruction function including Career Ladder Addenda, OPIP, and CSF – to include Performance Pay (Fund 012) as well as salaries paid out of other funds. This total salary shall represent the yearly value of the position occupied by this teacher based on where this teacher is on the salary schedule. Examples are provided in the instructions.

Please continue to include Purchased Services Personnel as if they are employed directly by the district. Any personnel filling an available district position but being paid through Smartschools or ESI shall be included in the SDER data in the same manner as district employed personnel. ADE is taking the responsibility to collect data from both Smartschools and ESI to allow these included personnel to be flagged as purchased service personnel.

The SDER On-Line Application will be able **to accept employee data on September 18, 2009**. Each teacher's years of experience recorded for FY 2009 will have been increased by one year for FY 2010. All districts must submit their data through the common logon by using the School Finance on-line system or by uploading data in a text file format. Again, the **file format has not changed** this year. You can find the required file format on the School Finance home page located at www.ade.az.gov/schoolfinance. Once there scroll down to SAIS Support and click on MIS Record Layout. This will bring you to SAIS Record Layout (School Finance System) click to open and select number 8.

If you are submitting a text file you must submit it to ADE through the common logon via the on line SDER system. In the SDER application you will find under Status Page, "File Import" to upload your file. **Once a new text file is submitted, all existing data will be replaced with the new file. Be sure to check your "import history" under file import. Click on "show details" to see if you have any errors on the data that you have uploaded. If you only have a few errors, you may correct them on our on line system otherwise you must submit the entire file (after corrections) again.**

After all data is correct, go to reports in the SDER application and print out your SDER reports. Please note that initially, you will not see the purchased services personnel (PSP) flagged as such. A notice will be sent out sometime in January announcing when the PSP personnel in your district have been flagged as such. If you have District Sponsored Charter Schools, with **all** teachers certified, please call Barbara Axe at (602) 542-5695 regarding submission.

If you do not have a common logon, please check with your business manager or superintendent. The district superintendent may request a logon for you by going to the ADE common logon page to the application access menu and selecting "request logons with access to SDER." You will be able to access your district information on-line by going to:

<https://www.ade.az.gov/commonlogon>

If you have technical problems in accessing or uploading your SDER file, or if you have forgotten your password please contact the ADE Support Center at: 602-542-7378.

If you need a copy of your prior year's FY 2009 SDER report or if you have any questions or concerns regarding the FY 2010 submittal, please contact Barbara Axe at (602) 542-5695.

Attachment – SDER Instructions

INSTRUCTIONS

FOR

SCHOOL DATA EMPLOYEE REPORT
(SDER)

Due October 15, 2009

Department of Education – School Finance
Phone: 602-542-8248
Revised September 10, 2009

REMINDERS FOR FY 2010

- I. **Inclusion of purchased services personnel provided through Smartschools and ESI.** The ADE is aware there are other agencies that provide personnel on a purchased services basis and these agencies will be included in the future. Only include purchased service personnel provided by these two vendors – other agencies may be added in the future.
- II. **TOTAL SALARY** All teacher and superintendent salary sources including those amounts paid from Classroom Site Fund (CSF – including performance pay), Instructional Improvement Fund (IIF), Career Ladder, Optional Performance Incentive Program (OPIP), and any state or federal grant shall be reported. Please exclude, however, extra duty pay for club sponsorship or coaching duties.

These salary amounts shall represent the yearly value of the position a teacher with a particular level of education and years of experience. In other words, assume that the teacher, based on their FTE, has a full year's contract.

III. **Position Codes**

- Position FTE for “M&O” now may include those employees paid out of M&O, CSF, IIF, FDK or any **State or Federal Grant**.
- We will no longer be requiring you to separate FTE between M&O and Other though if your system already breaks this information out, you may report it as such.
- Total FTE may be recorded under M&O, etc.

I. School Data Employee Report Overview

The primary use of School Data Employee Report (SDER) data is to calculate your district's Teacher Experience Index (TEI) pursuant to ARS 15-941. This TEI calculation may have the effect of increasing your budget limit and Equalization Assistance (state aid) in the subsequent year. This statute has been revised under 15-941 D as follows:

D. The superintendent of public instruction shall on or before March 15 notify each school district of its teacher experience index for the budget year. **BETWEEN MARCH 15 AND APRIL 15, A SCHOOL DISTRICT MAY SUBMIT CORRECTIONS TO DATA THAT IT SUBMITTED PURSUANT TO SUBSECTION C AND THE SUPERINTENDENT OF PUBLIC INSTRUCTION SHALL ON OR BEFORE APRIL 15 RECOMPUTE THE TEACHER EXPERIENCE INDEX FOR THE DISTRICT FOR THE BUDGET YEAR USING THE CORRECTED DATA. THE TEACHER EXPERIENCE INDEX FOR A SCHOOL DISTRICT THAT DOES NOT SUBMIT DATA CORRECTIONS BETWEEN MARCH 15 AND APRIL 15 SHALL BE THE TEACHER EXPERIENCE INDEX COMPUTED FOR THE DISTRICT BY THE SUPERINTENDENT OF PUBLIC INSTRUCTION ON OR BEFORE MARCH 15. A SCHOOL DISTRICT THAT SUBMITS DATA CORRECTIONS PURSUANT TO THIS SUBSECTION SHALL SUBMIT A LETTER EXPLAINING THE NEED FOR THE CORRECTIONS TO THE SUPERINTENDENT OF PUBLIC INSTRUCTION AND THE CHAIRMAN OF THE JOINT LEGISLATIVE BUDGET COMMITTEE.** The teacher experience index for the budget year shall not be recalculated after APRIL 15 unless the superintendent of public instruction determines that the school district has submitted data resulting in an overstatement of the teacher experience index for the budget year.

The SDER Master File lists the prior year's data for each district employee. All full-time and all part-time employees who function within the district and are paid from the district budget shall be reported. All personnel, inclusive of classified staff, principals, directors, and/or superintendents, who are provided through a purchased services contract with Smartschools or ESI Leased Personnel shall be included in the SDER. The same information required for district employees must all be included for these Purchased Services Personnel (PSP). Please note, however, that PSP teachers will be excluded from the TEI calculation.

Employees paid through an intergovernmental agreement shall not be reported on the SDER. A substitute teacher shall be listed only if under contract with the district and must be listed as a part-time employee. Retired teachers are to be included if they are filling a position whether working through Smartschools, ESI, or the district under the Arizona State Retirement rules.

REVIEW THE SDER FOR ACCURACY. Please review your SDER report for accuracy of all information. Check for proper spelling of the name and name changes. Some employee entries may need correcting due to changes in job assignment (promotion, transfer, etc.) and/or changes in the school to which the employee is assigned. The number of years of experience will have been increased by one for each employee with Codes 108, and 200 through 412.

II. SDER Rules and Definitions

Certified Teachers

A Certified Teacher is a person who holds a certificate from the Arizona State Board of Education to work in the schools of the State and who is employed under contract in a school district in a position that requires

certification. A teacher with an emergency teaching certificate SHALL be included. Teacher's with substitute teaching certificates are to be EXCLUDED. Other exceptions include a psychologist or an administrator devoting less than fifty percent of their time to classroom teaching. (ARS §15-501.2)

FTE – Full Time Equivalent

Full-time means employed **for a full school day, or its equivalent**, or for a full class load, or its equivalent, as determined by the governing board. (ARS §15-501.3) For purposes of computation, a full-time equivalent (FTE) certified teacher is 1.00 if employed full-time. If the teacher is employed less than full-time, multiply 1.00 by the percentage of a full school day, or its equivalent, or a full class load, or its equivalent, for which the teacher is employed as determined by the governing board. (ARS §15-901 B.

Teacher Experience

Complete this column for teachers only – Codes 108, 200 through 412. Certified personnel, whose codes are other than those mentioned, do not require the Total Years Experience field to be filled. Number of years of experience means the number of years of classroom instruction conducted by a certified teacher in the school district in which the certified teacher is currently employed including the number of years of experience of the certified teacher granted by the school district for the certified teacher on the district's salary schedule for experience outside of the school district. (ARS §15-941.E) A maximum of 15 years will be used in the Teacher Experience Index. (ARS §15-941. A)

Example 1

A teacher hired by your district has 12 years of teaching experience outside your district. She has been given 10 years credit for prior teaching experience on your district's salary schedule. She has also worked for your district for seven years (including current fiscal year). Her Total Years Experience is 17 (10+7). A newly hired teacher, who is teaching for the first time, automatically receives one year of experience.

Example 2

A teacher has been teaching for your school district for 10 years but is only at a place on the salary schedule representing 7 years (for several years, a step on the schedule was not granted by the Governing Board). This teacher still has **10 years of experience** for purposes of SDER.

Deleting Employees

Each individual who is no longer employed by your district as of October 1 must be deleted unless they are now filling a position in your district but are provided as purchased services personnel by Smartschools or ESI.

Adding Employees

Enter new employees as well as employees continuing from the previous year who were not included in the prior

year. Do not include employees who began employment after October 1 of the current school year. If an employee is assigned to two schools, the employee shall be entered on the listing for each school with the appropriate FTE indicated. Salary shall be reflected at each school based on the FTE allocation

Employee Identification Number

For certified employees, enter the number on the employee's certificate issued by the ADE Teacher Certification Unit or their Social Security Number. For classified employees, enter their social security number. If the Social Security number is not used, the district may assign an alpha, numeric or alpha/numeric ID number (up to 9 characters) for each classified employee, but you must be sure that no two employees have the same ID number.

Racial Ethnic Codes

Assign one of the following racial ethnic codes to each employee. These are the only codes acceptable in SDER. If the employee will not tell you their ethnic background you must choose one for them.

- W** White: A person having origins in any if the original peoples of Europe, North Africa or the Middle East. Exclude persons of Hispanic origin.
- B** Black: A person having origins in any of the black racial groups in Africa. Excludes persons of Hispanic origin.
- H** Hispanic: A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.
- I** American Indian or Alaskan Native: A person having origins in any of the original peoples of North American and maintaining cultural identification through tribal affiliation or community recognition.
- A** Asian or Pacific Islander: A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent or the Pacific Islands. This area included, for example: China, India, Japan, Korea, the Philippine Islands and Samoa.

Instructions for Assigning Position Codes – Certified

For certified positions, the First Position, use the code that identifies the assignment of 50 percent or more of the employee's time. The first position code must always be the highest FTE. If an equal amount of time is spent between two positions, the most critical position (in the district's opinion) shall be used as the First Position. The requirement to split FTE amounts between "M&O, CSF, IIF, etc" and "Other" has been removed. The full FTE, MAY be recorded under M&O, CSF, IIF, etc. If your reporting system separates out the FTE by Fund, you may continue to report the portion of FTE as indicated on SDER and split between the two fund types. **ALL TEACHERS, REGARDLESS OF PAYOUT FUND, WILL BE INCLUDED IN THE TEI CALCULATION (EXCLUSIVE OF PURCHASED SERVICE PERSONNEL.)**

For the Second Position, use the code that identifies the assignment of time less than or equal to the First Position. Second Position must be a different code than the First Position code. The SDER system does not allow the entry of more than two positions for one employee. In the event an employee is assigned more than 2 positions, add the least FTE to one of the other positions. In the event that one position is a certified position and the other, a

classified position, (for example: 207 - Elementary Teacher and 012 - Bus Driver) the employee shall be listed only on the certified listing.

Head Teacher (Code 108) may only be used in districts having fewer than five teachers. (ARS §15-503 A.2)

Assistant school psychologists, and school psychologists certified by the State Board of Education are to be considered certified employees. (Attorney General's Opinion I83-085). Be sure to code these employees correctly so that your SDER records will agree with what is submitted on the Annual Financial Report.

If a principal (103) or assistant principal (104) also teaches ("...activities which contribute to the instructional programs at the local school level," Arizona Administrative Code R7-2-901), that person shall be reported as having two positions with the appropriate FTE. For example: 104 Assistant Principal = .75 FTE and 217 Music Teacher = .25 FTE.

The position number of 225, Early Childhood Handicapped (PSH), is for a preschool teacher who holds certification for Early Childhood Handicapped. A certified teacher who teaches Preschool will be reported in Other (223).

To be included on the certified list, individuals must be certified by the State of Arizona Certification Unit, ADE. Otherwise, they must be reported on the classified list.

Administrative codes (100-107, 109-111): Use the administrative codes only for positions requiring an ADE administrator certificate (superintendent, principal, supervisor, etc.). If the position requires ADE certification (not administrator), is not a teaching position, and does not fit into one of the 600 – 605 codes, use the 606 (Other Certified) code.

It is extremely important that all employees, but especially teachers, be listed in the appropriate categorical codes. Please use the "Other" codes sparingly.

Teachers cannot be assigned to the district office. They must be assigned to a school where there are students. It is understood that there are itinerant teachers meeting needs at numerous schools in a district. These teachers may be recorded fully under 1 school or split between two. Resolving this issue is at your discretion.

Position Codes – Certified Personnel

Please review the Certified Code Table included below. This table lists the only valid certified position codes.

CERTIFIED CODES

ADMINISTRATIVE

100	Superintendent
101	Administrative Assistant
102	Assistant Superintendent
103	Principal
104	Assistant Principal
105	Curriculum Coordinator
106	Personnel Director
107	Supervisor
108	Head Teacher - Only use for districts having fewer than 5 teachers

109	Other – Administrative
110	Vocational Education Administrator
111	Business Manager
112	Director of Curriculum/Instruction
113	Director of Information Systems & Technology
114	Director of Special Education
115	Special Project Director
116	Department Chair

ELEMENTARY & SECONDARY TEACHERS (NON-VOCATIONAL)

200	Agriculture (Non-vocational)
201	Art
202	Bilingual
203	Business
204	Communication Arts (English, Journalism, Speech)
205	Drama (Dance, Theater)
206	Driver Education
207	Elementary Classroom
208	Exploratory Health Occupation
209	Foreign Languages
210	Gifted
211	Homebound
212	Home Economics (Non-vocational)
213	Humanities (Philosophy)
214	Industrial Art (Non-vocational)
215	Kindergarten Classroom
216	Mathematics
217	Music
218	Physical Education/Health
219	Reading
220	Remedial Education
221	Science
222	Social Studies
223	Other (Includes Preschool with certificate)
224	Computer Science
225	Early Childhood Handicapped (PSH)
226	ROTC

SPECIAL EDUCATION TEACHERS – Main Assignment – Major Portion of Students

300	Cross Categorical
301	Educable Mentally Handicapped
302	Trainable Mentally Handicapped
303	Physically Handicapped
304	Emotionally Handicapped
305	Learning Disabled
306	Multiple Handicapped
307	Remedial Education
308	Speech and Language Therapy
309	Hearing Handicapped
310	Visually Handicapped

VOCATIONAL TEACHER

400	Agriculture
401	Marketing & Distributive Education
402	Diversified Cooperative Education
403	Health Occupations & Homemaking
404	Home Economics (Consumer)
405	Home Economics (Specialized)
406	Home Economics Related Occupations

407	Industrial Arts – Vocational
408	Business Office Education
409	Special Needs
410	Trades & Industrial Education
411	Other – Vocational
412	Adult Vocational Teachers

ADULT EDUCATION

500	Adult Basic Education
501	Citizenship
502	English as a Second Language
503	General Education Development

OTHER

600	Coach
601	Guidance Counselor
602	Librarian
603	Media Specialist
604	Psychologist
605	Psychometrists – NO LONGER A VALID POSITION
606	Other
607	Support Specialist
608	Intervention Specialist
609	Title 1 Coordinator
610	Resource Support Specialist
611	Resource Teacher
612	Prevention Coordinator
613	Professional Development
614	Grants Manager

Instructions for Assigning Position Codes - Classified

For classified positions, there is only one position code field available. If the district has a classified employee with two positions please add the FTE together for both positions and assign them the position code of the highest FTE. Put the total FTE for the employee under M & O regardless of what fund they are paid out of.

Position Codes – Classified Personnel

Please review the Classified Position Code Table included below. This table lists the only valid classified position codes.

CLASSIFIED CODES

001	Accountant	054	Highly Qualified Paraprofessional Aides (Elem)
002	Audiologist	055	Highly Qualified Paraprofessional Aides (Special Ed)
003	Audiometrist	056	Highly Qualified Paraprofessional Aides (Secondary)
004	Elementary (teacher) aide	057	Technology Assistant
005	Secondary (teacher) aide	058	Assistant Nurse
006	Special Education (teacher) aide	059	Secretary
007	Librarian	060	Receptionist
008	Other – Miscellaneous	061	Library Assistant
009	Attendance Officer	062	Assistant
010	Bookkeeper	063	Health Office Aide
011	Bookstore Driver		
012	Bus Driver		
013	Business Manager		
014	Buyer		
015	Food Service Manager		

016	Food Service Worker
017	Cashier
018	Clerical
019	Community services Representative/Resource Worker
020	School Guard Crossing
021	Data Processing
022	Dispatcher
023	Guard
024	Custodian/Maintenance
025	Maintenance Supervisor
026	Mechanic
027	Mechanic Supervisor
028	Media Specialist
029	Dental Hygienist
030	Nutritionist/Dietician
031	Occupational Therapist
032	Personnel Director
033	Physical Therapist
034	Printer
035	Research, Evaluators/Statistician
036	Social Worker
037	Supervisor
038	Transportation Director
039	Warehouse & Inventory Worker
040	Other - Maintenance
041	Vocational Education
042	Personnel Assistant
043	Technician
044	Director-Other
045	Nurse
046	Guidance Counselor
047	Speech/Language Therapist
048	Food Service Director
049	Data Processing Director
050	Administrative Assistant
051	Media Assistant
052	Manager/Other
053	Bus Aide

FTE State Funds (M&O, Instructional Improvement (IIF), Classroom Site Fund (CSF) Full Day Kindergarten (FDK) or FTE Other

NO LONGER REQUIRED TO SEPARATE OUT THE FTE'S BY THESE FUND CATEGORIES – HOWEVER, YOU MAY CONTINUE SEPARATING THEM OUT IF YOUR SYSTEM IS ALREADY PROGRAMMED TO DO SO.

An employee who works full-time shall be reported as 1.00, and an employee who works less than full-time shall show the percentage of a full day or a full class load for which the teacher is employed. For example, if a teacher works two periods per day, the FTE shall be reported as 0.4. An employee shall not be reported as greater than a 1.50 FTE. Teachers with one semester contracts shall be reported as a Full 1.0 FTE if there are teaching full days. Their salary, however, shall be reported as the value of the position as if the employee were to complete an entire contract year.

The district's Teacher Experience Index (TEI) is calculated using only those employees who are assigned position codes of 108 and 200 through 412. **ALL TEACHERS IN THESE CODES, REGARDLESS OF FUND, WILL BE INCLUDED IN THE TEI CALCULATION.**

Grade Level

Indicate the grade level assignment for all certified employees. Use one of the following codes: E=Elementary K-8; S=Secondary 9-12; C=Combination.

New Employee

All new employees must have a start date and must be hired by October 1, 2009. Please exclude any employee who was hired after October 1, 2009.

Salary

Indicate the TOTAL SALARY for each teacher and the superintendent. TOTAL SALARY shall include ALL amounts budgeted REGARDLESS OF FUND but applicable to the INSTRUCTION FUNCTION ONLY. Total Salaries shall include performance pay components from Career Ladder, Classroom Site Fund, and Optional Performance Incentive Program. Total Salaries are only required for those teaching positions assigned codes 108 and 200 through 412 and for the superintendents position code 100. Superintendent's salaries must be included in your SDER Certified Report pursuant to (ARS §15-255.B.10) Please note that the TOTAL SALARY for the Purchased Services Personnel provided through Smartschools or ESI is each positions invoice amount.

Example 1

If a teacher's first position is listed as Elementary Classroom Teacher (Position Code 207) with a second position as Bus Driver (Position Code 012), the amount is that of Elementary Classroom Teacher only.

Example 2

If a teacher works in more than one school, multiply the salary by the FTE for each school. If a teacher earns \$30,000 and has an FTE of .40 in School 001 and an FTE of .60 in School 002, then the salary in School 001 is \$12,000 and \$18,000 in School 002.

Percent of Benefits

Complete this column for teacher's only, position codes 108 and 200 through 412. Enter the percentage of salary (i.e., 10%, 15%, etc.) that represents the cost of benefits. Benefits include health insurance, disability insurance, OASI, and retirement that your district provides teachers. Please report the percent benefits amount rounded off to the next whole percent. Use the same average benefits percent for each teacher in your district. Please exclude any % benefits for the Purchased Services Personnel provided through Smartschools and ESI.

Degrees

Complete this column for teachers using position codes 108 and 200 through 412. Use one of the education codes (1 through 42) for each teacher.

EDUCATION CODES

CODES	DEGREES
1	BA
2	BA + 3 hours
3	BA + 6 hours
4	BA + 9 hours
5	BA + 12 hours
6	BA + 15 hours
7	BA + 18 hours
8	BA + 21 hours
9	BA + 24 hours
10	BA + 27 hours
11	BA + 30 hours
12	BA + 33 hours
13	BA + 36 hours
14	BA + 39 hours
15	BA + 42 hours
16	BA + 45 hours
17	BA + 48 hours
18	BA + 51 hours
19	BA + Over 51 hours
20	MA
21	MA + 3 hours
22	MA + 6 hours
23	MA + 9 hours
24	MA + 12 hours
25	MA + 15 hours
26	MA + 18 hours
27	MA + 21 hours
28	MA + 24 hours
29	MA + 27 hours
30	MA + 30 hours
31	MA + 33 hours
32	MA + 36 hours
33	MA + 39 hours
34	MA + 42 hours
35	MA + 45 hours
36	MA + 48 hours
37	MA + 51 hours
38	MA + more than 51 hours
39	Education Specialist
40	Doctorate
41	Vocational Certificate
42	ROTC Certificate